Project Page Redesign

Get more done in less time

We heard your feedback about the continuous scrolling and added white space on the Project page. So, we redesigned it to help you work more efficiently and better manage your projects. The Project Page redesign is automatically enabled for you with ST-58. There are no new permissions and no changes to the functionality available to you, so everyone can keep working as they did before, only much more efficiently now.

WHAT'S NEW

★ Inline editing of Custom Fields & Project Status
★ Navigation Menu to quickly jump to specific sections
★ Actions consolidated into one 'Actions' dropdown
★ New Action Buttons found throughout page in their respective section

Click on the numbers to learn more about each section.

Navigation Menu

The new Navigation Menu makes it easy for you to access the exact information you need in one click. No more endless scrolling up and down the page. You can quickly click to review Job & Appointment History, check Project Purchase Order status, audit timesheets, and more!

Dashboard
Project Overview

Financials
Project costing, invoices, payments

Jobs & Appointments
Book or View Jobs

Estimates
Sold & Unsold Estimates

Purchasing
Purchase Orders & Requisitions

Technicians
Team's Timesheets

Audit Trail
Notes, Events & Media

Header

The Header is always visible at the top of the page.

1. Any Custom Fields you've configured to display on the project page will now be listed here (Permit Number & Pre-Site Complete in the example above). If you want to hide these, click **Hide Additional Info**.
2. Inline editing lets you quickly change the project status, update custom fields, or change the image. Click the **Pencil Icon** next to the **Actions** button for all additional edits.
3. We've consolidated all of the same actions available to you in a new Actions dropdown. This saves you time from having to scroll to the top of the page if you need to book a new job..

*Please note, the **Add Application for Payment**, **Build Estimate**, **Add Invoice**, and **Create Payment** action buttons are only visible to customers with Project Tracking enabled. The **Add Purchase Order** and **Add Requisition** action buttons are only visible to customers with Project Requisition functionality enabled. For more information on Project Tracking or Project Requisition functionality, please reach out to your CSM.*

Dashboard

The Dashboard displays relevant project information such as the Project Manager, contractual information, and the description. Need to update key project dates? Click the pencil icon in the header.

PROJECT MANAGER
Keegan

START DATE
05/04/2021

TARGET COMPLETION
01/28/2022

ACTUAL COMPLETION
__/__/____

CONTRACT FOR
CapEx Improvements

CONTRACT DATE
05/04/2021

PROJECT DESCRIPTION
Planned improvements per approved capital expenditure plan

Financials

The Financials section displays all information related to the project financials, including Project Summary*, Budget vs Actual*, Expense Details*, Invoices, Created Payments, and Application for Payments*. In addition, Jobs & Appointments have been moved to their own section for better organization.

BEFORE

AFTER

*only available for customers on Project Tracking

Financials Continued

Let's walk through some of the other notable changes you'll see in the Financials section.

Project Job Costing

First, the Job Costing flyout has been moved to the top of this section and renamed Project Job Costing. Previously, you had to scroll to the bottom of the page, and it was a bit hidden between Purchase Orders and Technicians.

BEFORE   AFTER

Invoices & Payments

We've made it seamless to add invoices* and create payments* by including each action button at the top of each table. Previously, the only way to add an invoice or payment was to scroll to the top of the page.

Application for Payment

For those using Project Tracking, you'll also find it easier to create new payment applications with the button also displayed at the top of the Application for Payment section. Similar to Invoices and Payments, this was only accessible at the very top of the page.

*only available for customers on Project Tracking

Jobs & Appointments

The Jobs & Appointments section includes Jobs and Appointments related to the project. While these tables look similar to before, the most significant and most beneficial change you'll see is the ability to Attach Existing Jobs and Book New Jobs right from this section. So again, no more needing to scroll to the top of the page to do this.

BEFORE

AFTER

Estimates

Outside of the new look, you'll see three notable changes in the Estimates section:
1. Estimates and Opportunities* are bundled in one section when previously they were separated on the page.
2. You'll see a persistent Build Estimate button*.
3. When you click Build Estimate, you'll be able to either add it to an existing opportunity or create a new opportunity.

BEFORE

AFTER

*only available for customers on Project Tracking

Purchasing

The Purchasing section includes all information related to Purchase Orders and Requisitions. In addition to the new look, you'll also be able to Add Purchase Orders and Add Requisitions directly from here (if Project Requisition functionality is enabled). Again, no more scrolling to the top.

BEFORE

Purchase Orders

PO #	Vendor	Technician	Date	Status	Job #	Summary	Amount
216	Grainger	Hiren Pandya	07/27/2021	Received			$7,000.00
215	Grainger	Hiren Pandya	06/17/2021	Received			$13,960.00

▣ $24,750.00	▣ $0.00	▣ $24,750.00	▣ $15,120.00	▣ $9,630.00	▣ $20,960.00
Subtotal		Total	Payments	Balance	Purchase Orders

▣ $0.00
Materials

AFTER

Purchasing

Purchase Order   + Add Purchase Order

PO #	Vendor	Technician	Date	Status	Job #	Summary	Amount
215	Grainger	Hiren Pandya	06/17/2021	● Received .			$13,960.00
216	Grainger	Hiren Pandya	07/27/2021	● Received .			$7,000.00

|◀ ◀ 1 ▶ ▶| 1 - 2 of 2 items

Requisitions   + Add Requisition

Requisition Name	Technician	Date	Status
No records available			

Technicians & Audit Trail

There are no significant changes to the Technicians or Audit Trail sections, just that you can now access them in one click from the navigation menu.

BEFORE

Technicians

Photo	Name		Driving	Working	Total
	Andre Young		3h 41m	9h 55m	13h 36m
	Eric Wright		1h	8h 30m	9h 30m

Total Labor Burden	$178.50	1%
Total Material Costs	$20,960.00	85%
Total Cost	$21,138.50	85%

AFTER

Technicians

Name	Driving	Working	Total
No records available			
Team Totals	0m	0m	0m

BEFORE

History

💬 Leave a note...

📎

All (18)	🗓 Events (17)	☎ Calls (0)	✏ Notes (0)	🔗 Files (40)	✉ Email (1)

After checking Capacity Planning marodemo picked arrival window manually
12/02/2021 3:37 PM

marodemo **added** Potential Member tag to job
12/02/2021 3:37 PM

marodemo **booked** the job. The appointment # 9645891-1 is for **06/12/2021 7:00 AM** arrival window **7:00 AM - 5:00 PM**
12/02/2021 3:37 PM

After checking Capacity Planning marodemo picked arrival window manually
12/02/2021 3:25 PM

marodemo **added** Potential Member tag to job
12/02/2021 3:25 PM

AFTER

Audit Trail

💬 Leave a note...   📎

All (20)	🗓 Events (19)	☎ Calls (0)	✏ Notes (0)	🔗 Files (2)	✉ Email (1)

After checking Capacity Planning marodemo picked arrival window manually
12/02/2021 3:35 PM

marodemo **added** Potential Member tag to job
12/02/2021 3:35 PM

marodemo **booked** the job. The appointment # 9645783-1 is for **06/12/2021 7:00 AM** arrival window **7:00 AM - 5:00 PM**
12/02/2021 3:35 PM

marodemo **unassigned Bryan Williams** from the appointment # 9645763-1
12/02/2021 3:30 PM

marodemo **assigned Bryan Williams** to the appointment # 9645763-1
12/02/2021 3:19 PM

After checking Capacity Planning marodemo picked arrival window manually
12/02/2021 3:17 PM

marodemo **added** Potential Member tag to job
12/02/2021 3:17 PM

BACK TO PAGE 1